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ABSTRACT

This Personalized Activity Kit focuses on one aspect of management by objectives--procedures for developing a plan that will help the participant meet his staff objectives. One way to report progress to one's superior is also suggested. Staff objectives state who, by job title, will do what. The plan sheet is made up of hows with deadline dates. The resource sheet identifies the necessary people, equipment, and supplies to carry out the plan. Estimated costs are derived and added up to give a total estimated cost. The more steps on the plan sheet, the higher the cost of resources will be. Many administrators are moving to management contracts based on their performance of their staff objectives. In these contracts, it is necessary to know ahead of time what the critical need or priority areas of the district are. The advantage in writing one's own objectives is that one knows how he is to be evaluated.

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A SCHOOL IMPROVEMENT - ACCOUNTABILITY PROCESS KIT

PAK # 4.4 - PUTTING STAFF OBJECTIVES INTO OPERATION

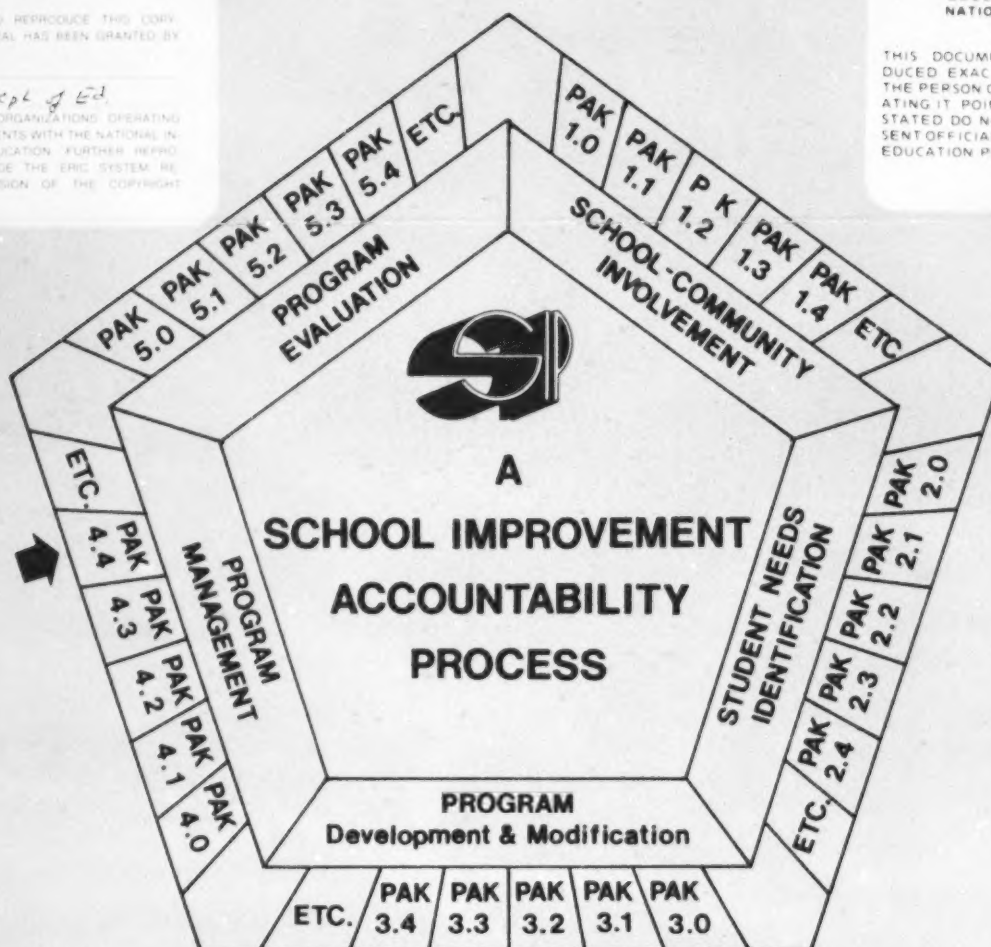
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Personalized Activity Kit (PAK) for use as:

- Individualized Study Guide
- Small Group Study Guide
- Workshop Facilitator's Guide

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A SCHOOL IMPROVEMENT - ACCOUNTABILITY PROCESS KIT
PAK #4.4 - Putting Staff Objectives Into Operation

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Please note . . .

When you have completed this packet, we would appreciate any recommendations you may wish to make about improving the content, activities, or format.

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DIRECTIONS FOR THE USE OF THE PAK

Each PAK is designed to be used in three alternative ways: 1) an individual user can work through the packet on his own; 2) a small group may work co-operatively; or, 3) a group of participants may be involved in a workshop situation under the leadership of a facilitator. Experience indicates that the latter is the most desirable situation. While an individual may work through the materials on his own, he misses those shared experiences which come as learners interact in a group situation.

PLEASE NOTE

Because this PAK will be used by many people in your district, please mark only the worksheets supplied by your instructor. Do not mark the pages of this PAK. Sample transparencies and worksheets (for duplication) are included in Appendices A and B.

If you are using PAK materials in a group workshop situation, consult Appendix A for detailed instructions. The diagram on the cover page and diagrams for Appendix A may be used to make overhead transparencies.

If you are working through the PAK individually, follow the general directions listed below:

- ° Read content of the PAK.
- ° Refer to Appendix A, Page 2, for additional instructions.
- ° Do the activities on worksheets copied from Appendix B.
- ° Read the bibliography (when included).

PUTTING STAFF OBJECTIVES INTO OPERATION

Purpose:

The purpose of this PAK is to help the participant learn one procedure for developing a plan that will help him/her meet his/her staff objective(s). One way to report progress to one's superior is also suggested.

MBO - Setting Objectives - Step 2

There are different approaches to the setting of staff objectives. One way is for the superior to write tentative objectives which he believes should be accomplished by the subordinate. The subordinate reacts to these and eventually mutual agreement is reached. This works satisfactorily in an organization with an open climate; however, this procedure is more likely to produce superficial agreement due to:

- ° Subordinate's fear of disagreeing with his superior.
- ° Subordinate's feeling that these objectives have been imposed upon him without his participation in the process.
- ° Subordinate's feeling that some of the objectives are not practical or feasible.
- ° Subordinate's commitment level is apt to be lower because he does not feel that these are his objectives.

Another approach to setting mutually agreed-upon objectives is called the dialog/memo technique. In this method, the superior and the subordinate sit down and discuss objectives, arriving at mutual agreement through conversation. Then the superior formalizes the mutual agreements reached, by sending a confirmation memo to the subordinate.

The dialog portion is most important. If it is omitted, then the effects of the memo can produce the same results as those described in the first approach. A cold, impersonal memo can turn people off faster than just about any other management strategy used today. The new manager must constantly remind himself that he is managing people, not resources. If he manages his staff well, they will manage the resources well.

Basic Principles in Setting Mutually Agreed-Upon Staff Objectives

1. Objectives must be consistent with organizational goals, needs, and priorities. They must be geared to helping students achieve their learner outcomes, either directly or indirectly.
2. Objectives must be measurable, so that results obtained can be used later. Desired results should be realistic and attainable.

3. Objectives should be stated so as to produce changes in behavior and results. They should not simply set down in writing the activities which would have been performed anyway. An objective should state what is to be achieved, not how it is to be achieved.
4. Objectives should be stated in a form which allows their use for self-evaluation and self-improvement. They should include the significant areas where performance is to be measured and evaluated. They should not be etched on copper and buried in a cornerstone to be disinterred a year later for annual performance appraisal reports.
5. Usually, staff objectives, written by an individual or a group, cluster into the following categories:

- A. Personal/Professional Growth: To describe an effort to increase one's professional competency by acquiring new skills or knowledge; to set objectives for personal growth, the results of which may be directly related to improving the learning environment for students.

How to Measure: By solutions produced by planned deadline

When: Deadline date

* * * * *

- B. Program Innovation: To describe an effort to initiate planned change in the curriculum or to implement improved management and/or supporting services in order to meet identified learner needs.

How to Measure: By deadlines for various stages

When: As each stage is completed

* * * * *

- C. Staff Relationships: To describe an individual or collective effort to improve the functioning of staff members in their professional relationships with students, parents and with each other. (e.g. communications, team building skills, etc.)

How to Measure: *By exception - when person falls above or below acceptable range of performance

When: Whenever exceptions occur and at annual review time

* * * * *

- * Management by exception will be explored in greater detail in PAK #4.5.

For a healthy organization, when staff objectives are looked at collectively, there should be a pattern of staff objectives being written within all three categories.

For detailed instructions on how to write staff objectives, see the #3 series of PAKs. Different authors use different methods to determine areas for writing staff objectives:

- ° One example is to use the job description as a basis for staff objectives.
- ° Another set forth by Reddin in EFFECTIVE MANAGEMENT BY OBJECTIVES is the development of "Effectiveness Areas" where performance or non-performance would make a significant difference in overall achievement of the organization's goals.
- ° Still another method is a combination of the program objectives for which the manager has a responsibility and the effectiveness areas as set forth by Reddin. Neither by themselves can provide the full range of accountability needed.

Developing a Plan and Identifying Resources - Step 3

The first step in developing a plan is to determine what the target, or staff objective, is. The objective states what is to be done. The hows are part of the plan. One high school principal in a large school was dissatisfied with his current method of teacher appraisal. He discussed with his superintendent the possibility of developing a new method. The superintendent agreed that this was a real problem area and allocated the principal a maximum amount of \$8,000 for the project. The principal then wrote the following staff objective for himself:

Staff Objective

The principal will develop and implement an improved teacher appraisal procedure. Attainment will be achieved when 90% of the teachers write their own staff objectives as a basis for their appraisal.

Next, a sequence of activities with a time deadline for each activity was determined. For example, the activities and deadlines selected to carry out the principal's staff objective were:

<u>Activities</u>	<u>Deadline</u>
1. Principal writes his own staff objectives for the school year.	8-24-73
2. Plans staff workshop.	8-27-73
3. Conducts staff workshop.	8-31-73

<u>Activities</u>	<u>Deadline</u>
4. Teachers develop and refine their own staff objectives to present to principal for discussion and consensus.	9-4-73 to 9-21-73
5. Final copy of staff objectives placed in each staff member's personnel folder.	9-28-73
6. Conduct periodic classroom visitations as required by district policy and discuss with each teacher the progress made toward achieving the teacher's staff objective(s).	10-1-73 to 3-15-74
7. Completes all appraisals.	5-15-74
8. Conducts survey (with an anonymous evaluation instrument) of staff to determine effectiveness of new method.	5-20-74
9. Completes evaluation of new method.	6-7-74

The staff objective and the above activities with deadlines are put on a PLAN SHEET. Once the plan sheet has been completed, then, using a RESOURCE SHEET, the resources necessary to support the plan can be identified and estimated costs can be determined. By placing the Plan Sheet to the left of the resource sheet, it is not necessary to repeat each activity. Resources and estimated costs needed for each activity can be identified by using the number assigned to the activity on the plan sheet. Work through each activity, one at a time, moving across the Resource Sheet.

There are four columns on the Resource Sheet. The headings and explanation of what is included under each heading are as follows:

- ° Staffing--identify by job title who will do the activity. Estimate how much time it will take and convert this time into estimated costs or dollars. Include only those people who work for you.
- ° Resources and/or Administration--identify what equipment, facilities, tools, records, and/or statistics will be needed by the people identified in the staffing column. Convert to dollars.
- ° Coordination--identify additional staff needed who are responsible to other managers. How many hours of their time will be needed? Here is where you "plug-in" people who do not work for you. Convert to dollars.

- ° Evaluation--identify questions to be asked, the answers to which will tell you the degree of success or achievement in each step of the plan.

Continuing with the principal's objective and plan, the first few steps of the resource sheet would look like the following:

<u>Staffing</u>	<u>Resources Administration</u>	<u>Coordination</u>	<u>Evaluation</u>
1. Principal and Secretary-1 day @ \$140.00	Paper and Acetate \$1.00	--	--
2. Principal and Secretary-1 day @ \$140.00	Paper for Handout \$1.00	--	--
3. Principal and Administrative Staff-1 day @ \$300.00 60 teachers, 4 hrs @ \$8.50, \$1,800.00	Film rental-\$30.00 Coffee 2.50 Materials-Paper- 5.00 Building Rental- 50.00 Transportation- 192.00 30 cars @ \$6.40 Lunch- 130.00 65 @ \$2.00	Janitorial Staff-\$50.00 Workshop Bldg.- Principal 1 hr. @ \$10.00- 10.00	Should we repeat this procedure in future years? Can this be better handled in on-site workshop? Should it be done with new teachers only in the future?

Now, to see how this looks when it has been put together, look at the full plan on the next three pages - the plan sheet, the resource sheet, and the final evaluation instrument. This is an adaptation of a plan developed by Mr. Orlan Cox, Principal of Golden High School, Jefferson County Schools.

OBJECTIVE: - The principal will develop and implement an improved teacher appraisal procedure.

DEGREE OF ATTAINMENT: - 90% of the teachers will write personal staff objectives as a basis of their appraisal during the school year 1973-74.

PROGRAM ACTIVITY:

DEADLINE:

- | | |
|---|-----------------------|
| 1. Principal writes own staff objectives for school year 1973-74. Produced in acetate. | 8-24-73 |
| 2. Principal completes plans for workshop at Outdoor Education Laboratory. | 8-27-73 |
| 3. Outdoor laboratory workshop: | |
| a. Film on performance appraisal. | |
| b. Review of district's goals - acetate. | |
| c. Review learner objectives - handbook. | |
| d. Principal's presentation of his objectives. | |
| e. Staff, divided by departments and in groups of three, brainstorm what must be done to help students achieve district goals. | |
| f. Entire departments share ideas. | |
| g. Staff works on department objective to produce at least one major objective for the year to help students achieve a district goal. | |
| h. Each teacher writes down areas of personal concern for himself. | |
| i. In groups of three, within or without own department, shares personal concerns. (This activity is optional for each teacher.) | |
| j. Each teacher rough drafts own staff objectives, which should include: | |
| (1) support of department objective, | |
| (2) as many staff objectives as desired, | |
| (3) methods of accomplishing objectives, and | |
| (4) evidence submissible for evaluation. | |
| 4. Teachers develop and refine own objectives for final draft to present to principal to identify mutual concerns. | 9-4-73 to
9-21-73 |
| 5. Final draft submitted for inclusion in staff member's personnel folder. | 9-28-73 |
| 6. Principal conducts usual classroom visitation, as required by policy. | 10-1-73 to
5-15-74 |
| a. Reviews teacher objectives to determine progress. | |
| b. May refine objectives based upon teacher's experience. | |
| c. Dialogue to determine written appraisal. | |
| d. Writes appraisal in presence of teacher. | |
| 7. Completes all teacher appraisals. | 5-15-74 |
| 8. Conducts survey of staff to determine effectiveness of new method. | 5-20-74 |
| 9. Completes evaluation of new method. | 6-7-74 |

Staffing	Resources-Administration	Coordination	Evaluation
1. Principal and Secretary - 1 day @ \$140	Paper and acetate \$ 1.00		
2. Principal and Secretary - 1 day @ \$140	Paper for handout \$ 1.00		
3. Principal and Administration Staff 1 day @ \$300	Film rental \$ 30.00; Coffee \$2.50; Materials-paper \$5.00; Building use rental \$50.00; transportation-30 cars, @ \$6.40 - \$192.00; Lunch - 65 @ \$2.00 - \$130.00	Janitorial staff \$50.00 Outdoor education principal 1 hour @ \$10.00 - \$10.00	Would we want to repeat this procedure in future years? Can this be han- dled quicker in normal workshop? Can it be done with new teachers only in the future?
4. All teachers - 60 teachers 4 hrs. @ \$8.50 - \$1800; Principal consults with teachers 60 hrs @ \$12 - \$720	Lunch - 65 @ \$2.00 - \$130.00		
5. 60 teachers 1 hr. @ \$8.50 - \$510.00	Clerical to type 1 hr. each - 60 @ \$ 3.00 - \$180.00; Paper \$1.50		Is principal's devoting a minimum of four hrs. per teacher a worthwhile expenditure of time and money?
6. Principal visits and consults with each teacher - minimum 4 hrs. each 4 x 60 - 240 hours.			
7. Principal one hr. each teacher, 60 x \$12 - \$720; Secretary 60 hrs @ \$3.00 - \$180.00	Forms and paper, folders 60 @ 15¢ - \$ 9.00		Is this evaluation method worthwhile in terms of time of teachers? Does it accomplish the objectives of improved evaluation? Incidentally, has morale of teachers improved? Do they feel better about the method?
8. Writing evaluation instrument 1 hr. @ \$12 - \$12.00; Secretary 1 hr. @ \$3.00; 60 teachers each 1 hr. @ \$6.00 per hr. - \$97.50			
9. Tabulation by secretary 1 hr. @ \$3.00 - \$3.00; Principal assistants and team leaders, 1 hr. @ \$12; 1 hr. @ \$10; 1 hr. @ \$8; 1 hr. @ \$8, 12 hrs. @ \$6.50 - \$78.00			
TOTALS \$ 6,438.50	\$ 603.50	\$ 60.00	\$ 7,102.00 Is this expense of time and dollars worthwhile?

EVALUATION OF NEW TEACHER APPRAISAL SYSTEM

INDICATOR OF FEELING - Write in your response:

Compared to previous appraisal methods in this school, I:

5
highly
approve

4
approve with
reservations

3
indifferent

2
disapprove

1
strongly
disapprove

FEELINGS:

- ___ 1. I feel this is an improved method.
- ___ 2. I feel this is little different from previous methods.
- ___ 3. I feel this is a poorer method
- Go or no go
- ___ 4. I feel it should be continued.
- ___ 5. Makes no difference which method we use.
- ___ 6. I feel we ought to discontinue this method.

You are invited to comment regarding your feelings concerning this method of appraisal. You may sign form if you desire.

Did he stay within the \$8,000.00 allocated?

- ° Assume he had unexpectedly received a 20% reduction in his maximum cost factor. How might he go about achieving the same or nearly the same results?

NOTE: Steps or activities can "chew up" resources.

To stay within limits, he would have to examine his nine plan steps. Can any of them be eliminated? Can some be consolidated? Are there other alternatives, such as using a school building instead of renting space?

- ° Assume he had unexpectedly been given a 20% increase in his maximum cost factor. How might he use additional resources to best advantage? Is the plan strong enough as it is so that a savings can be effected?

Notice the evaluation questions throughout the plan. These are decision points - continue, modify, drop. The answers to these questions are also the basis for periodic progress reports to his supervisor. In Appendix B, you will find a plan sheet and a resource sheet. Using copies of these forms, you will be asked to identify a major objective you want to achieve this year, develop a plan, cost out resources, and write a final evaluation instrument or procedure.

MBO Performance Contracts

In many districts, administrators have developed their own staff objectives and these become the basis for their contracts. Usually, four to six major objectives are all that any one administrator can deal with at one time. Agreement on priority areas for the school year must be determined prior to the development of mutually agreed-upon staff or performance objectives, so that staff objectives and work are directed to critical areas of need. Staff objectives written at the top level of administration tend to be more general, while those written at succeeding levels become increasingly specific.

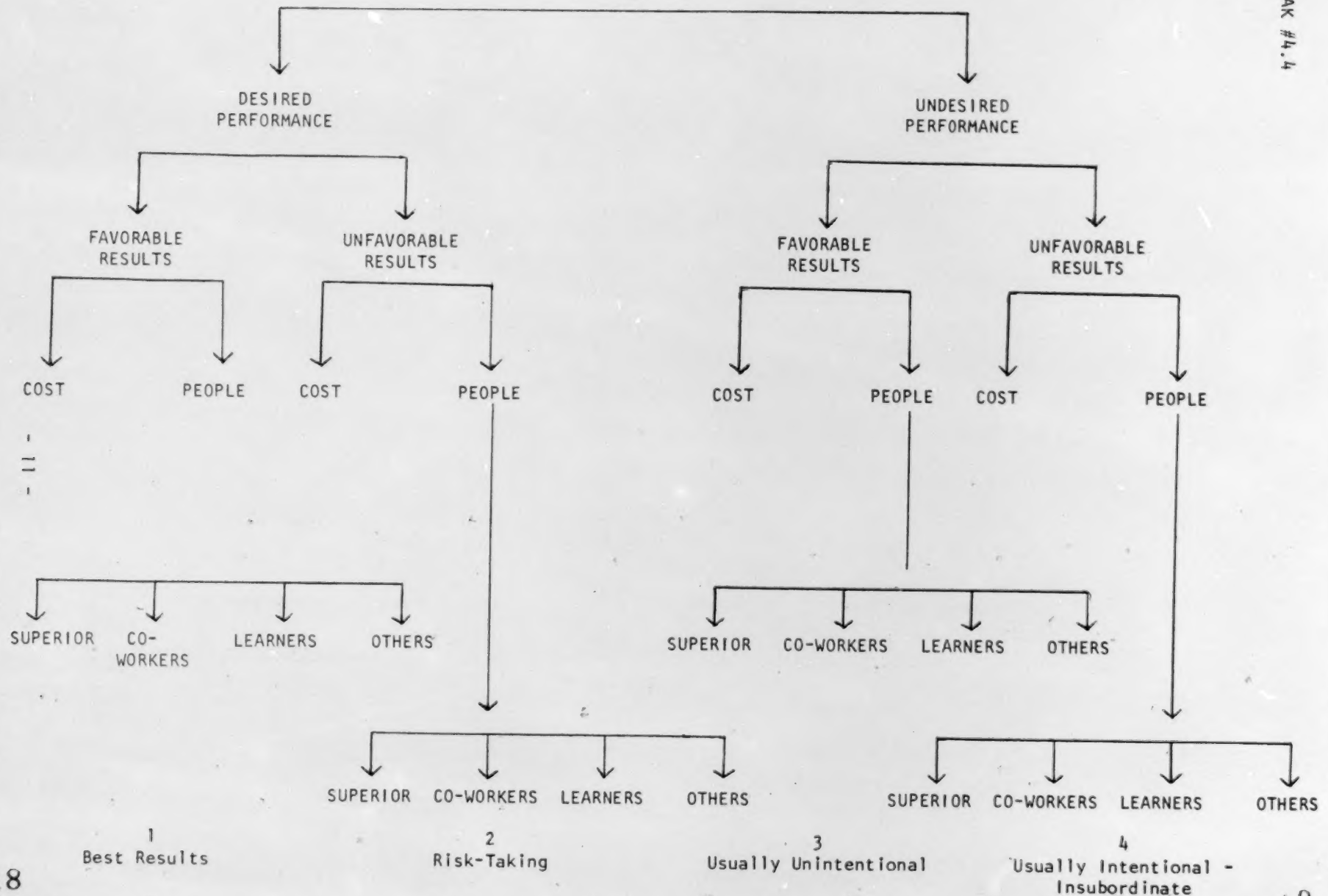
Basically, performance has two possible results--good or bad. A good or desired performance can result in favorable outcomes, which is the best result. It can, on the other hand, unintentionally result in unfavorable outcomes. A bad or undesired performance can result in favorable outcomes, and this is all right, since no harm has been done. Probably the least desirable result occurs when a bad or undesired performance results in unfavorable consequences. This is viewed as deliberate or intentional. Before writing his/her own staff (performance) objectives, the person should look ahead at all possible consequences.

The chart on the next page graphically illustrates this idea. Another application is in the planning process. Look at all alternatives and try to foresee all possible results and/or consequences before making a decision.

RESULTS OF PERFORMANCE

A PERSON

PAK #4.4



PROGRESS REPORT

Period beginning _____ ending _____

Person submitting report _____

PAK #4.4

State Objective	Activities to Accomplish Objective	Progress/Results	Problems - How Solved or Help Needed

- 12 -

Reporting Progress - Step 3

Progress reporting periods are determined by the local school district. Whatever schedule is adopted, many authorities recommend at least four reporting periods during the year. Many formats have been developed, and one suggested form appears in this section. While formats may differ, progress reports usually have these elements in common:

- ° State the objective.
- ° Report activities undertaken to achieve this objective.
- ° Report progress/results.
- ° Identify any problem - if you successfully solved the problem, what strategies did you use? Your superior may want to build a file of successful strategies that can be made available to his staff if similar problems arise. If you have not been able to solve the problem, what help do you need from your "boss"?

Personal Growth Plans

Many authorities believe that MBO results in appraisal of the quality of activities, rather than the quality of outcomes. These people advocate the addition of a personal growth plan which helps staff members identify their strengths and weaknesses. It is one good way to do an effective self-appraisal, rather than having it "laid on" by someone else. On the next few pages is an example of a personal growth plan.

An individualized Staff Development Program can be planned and carried out, using a collection of personal growth plans. This brings us back to a basic principle of management:

ORGANIZATIONAL DEVELOPMENT IS DEPENDENT ON STAFF DEVELOPMENT

PERSONAL GROWTH PLAN (Example):

Based upon previous recommendations of the superintendent and my own personal objectives, the following objectives are presented for the school year 1973-74.

OBJECTIVE:

The high school principal will demonstrate a more positive image of the school in the eyes of its public.

HOW:

- A. Hire a part-time person from lay assistant ratio to coordinate newsworthy articles for publication in news media. Principal, staff and secretaries.
 - 1. Collect positive, newsworthy articles of events occurring in the school.
 - 2. Use present reproduction methods.
 - 3. Use volunteers for mail-outs.
 - 4. Develop positive relationship between school and media.
- B. Conduct parent meetings during first week of school to explain program along with school's philosophy and objectives - principal and staff.
- C. Encourage staff to carry positive attitudes about school to students and public.
- D. Continue to strengthen parent contacts.
- E. Conduct weekly coffee meetings with invited parents.

EVALUATION:

Objective will be accomplished when:

- A. There is at least one major article per week in news media.
- B. Staff has conducted at least three nights for parent information explaining objectives of program.
- C. Principal has surveyed staff to determine effectiveness of program.
- D. Principal solicits feedback from parents through surveys, concerning attitudes toward high school, and uses information to strengthen program.

OBJECTIVE:

The high school principal will demonstrate a warmer, more stable image to others.

HOW:

1. Smile more, frown less with staff and public.
2. Be positive and direct, not negative and indirect.
3. Practice reflective listening skills, hear people better.
4. Attempt to be more consistent in behavior.
5. Continue the Christmas party at my home and consider a spring party.
6. Work with faculty liaison committee.

EVALUATION:

Compared to previous evaluations, using the form "My Principal," Survey will indicate that I have succeeded to a higher degree than previously. Also, be ready to accept and use feedback from public, from superintendent, and others.

OBJECTIVE: The high school principal will support the district goals more directly.

HOW:

1. Assist teachers to determine effectiveness.
2. Class formed at senior high school composed of 75% of staff (15 to 20 persons.)
3. Survey students' attitudes toward school - sophomores in fall and spring; juniors and seniors in spring.
4. Compare: Dropout rates from previous years.
College enrollment of seniors.
Number of students in coordinated job programs.
Grade distribution comparisons.
Attendance records.

These will be unobtrusive measures, making comparisons from previous years. Positive assumptions may be drawn when there appears to be progress in a positive direction.

Example: The dropout rate goes down 1% or more, attendance in school is increased by .5% or more. At present we have no organized baseline data, but it can be and will be prepared for evaluation by May, 1974. No attempt will be made this year to develop scientific instruments.

OBJECTIVE:

The high school principal will promote more human relationships among all staff of school.

HOW:

1. Be positive and supportive and encourage others to be also.
2. Include all personnel in social activities, such as the Christmas party and spring golf meet and party.
3. Encourage attendance at school activities.

EVALUATION:

Using one secretary, one assistant principal, two lay assistants, one custodian, one cook, two volunteers, three student council members, the superintendent will be encouraged to meet with this group to obtain their feelings on this specific objective. Report will be subjective.

SUMMARY

This PAK focused on what we do with staff objectives once we have written them. (Specific instructions on how to write staff objectives can be found in the #3 series of PAKs - Program Development/Modification.)

Staff objectives state who, by job title, will do what. The plan sheet is made up of hows with deadline dates. The resource sheet identifies the necessary people, equipment, and supplies to carry out the plan. Estimated costs are derived and added up to give a total estimated cost.

The more steps on the plan sheet, the higher cost of resources will be. To cut down cost, fewer steps should be used on the plan sheet. Answers to evaluation questions provide the basis for decisions - continue, modify, drop - and for progress reports to superiors.

There are several sources of ideas for writing staff objectives: job descriptions, effectiveness areas, personal growth plans. A combination of these is probably a more effective approach. Many administrators are moving to management contracts based on their performance of their own staff objectives. In these contracts, it is necessary to know ahead of time what the critical need or priority areas of the district are. The contract should consist of no more than four to six objectives. Staff objectives tend to be specific in the lower echelons and become increasingly general up to the top - the superintendent. If a person does not accomplish his objectives one year, then he may well discover that these objectives have become the superior's objectives for the next year. The advantage in writing one's own objectives is that one knows how he/she is to be evaluated. Knowing this makes the individual more productive.

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OBJECTIVE (What):

PROGRAM STEPS (How's):

Deadline

RESOURCES SHEET

PAK #4.4

Resources
or
ADMINISTRATION

STAFFING COORDINATION EVALUATION

--	--	--	--

B-2

PAK CRITIQUE FORM

PAK # _____
(Please fill in number)

Please give your assessment and comments on the following:

PROGRAM ELEMENT	OUT- STANDING	VERY GOOD	FAIR	POOR	VERY POOR	COMMENTS
1. The quality & relevance of the subject matter.						
2. The appropriateness and usefulness of the instructional materials.						
3. The timing or sequencing of the various items presented.						
4. The directing and assistance given on the exercise.						

Other comments or suggestions for improving this PAK:

If this PAK was used as part of a WORKSHOP training session, then please also complete the following:

PROGRAM ELEMENT	OUT- STANDING	VERY GOOD	FAIR	POOR	VERY POOR	COMMENTS
5. The deployment, grouping or planned interaction of the participants.						
6. The productivity and/or usefulness of the individual work session(s).						
7. The comments or assistance given to you on your selected problem.						